CRM (Community Relations Management) MODULE

MEMBERS ONLY's CRM MODULE is the central data resource of the system, containing the tools needed to manage and track the persons and organizations comprising your community.

The Core

People and Organizations

The MEMBERS ONLY Contact Database consists of all the Persons and Organizations that you keep track of. These entities might be members, customers, speakers, your members' employers, hotels where you hold events, or any other person or organization that you need to be aware of. Each person can be affiliated with a specific organization. And all the people associated with a given company appear listed in a grid on the company's Organization record.

Addresses and Phone Numbers

- MEMBERS ONLY allows you to keep track of an unlimited number of addresses, telephone numbers, and electronic means of contact such as email address or web site, for each person or organization in your central database.

- Each address has an *Address Type*, such as Home, Office, Corporate, or Billing. For each person or organization, one address is preferred - this is the address used when no specific address is requested, or if an address of the requested type is not on file.

- An address can also be made *seasonal*. A season address is in effect only between specified dates, after which the preferred address automatically comes back into use.

Memo Pads

- Each record in the Central Database can have up to ten free-form memo pads attached.

- Your system supervisor sets up names for the memo pads.

- Each memo pad can be given a template. A template is a set of headings, which appear in the blank memo pad to prompt users for the type of information expected.

If any of the memo pads on a specific person or organization have data, a MEMO icon appears at the top of that person's record. The first Memo pad is the Alert Memo - when any information is filled in here, an ALERT icon appears at the top of that person's record.

Geographical Search

- The Geographical Search allows you to retrieve to your desktop all persons or organizations in a given geographical area.

- The area can be specified as a country, a City, a State, a Zip Code or Partial Zip Code, telephone area code, or a user-defined *region*.

- When the results of the search are displayed, the user can jump immediately to the complete display of any record, or output the search results as a printed directory, a merge file, or as comma-separated values.

Lists

- Every person in the central database can be placed on *any number* of user-defined *Lists*. There is no limit to the number of lists you can define.

- Each lists acts as an index for fast retrieval in queries and reports.

- The Lists can be maintained in a structured fashion, with any list containing multiple sub lists. Not only can a user see which lists any person has been assigned to, but a browser of all the people in any given list can be displayed on the screen.

- Using this list browser, a user can add or remove people from the displayed list. A wide range of predefined outputs are available for this list displayed in the browser, including labels, export files, and word-processing merges.

Homepage

Our Homepage allows each user place on their Members Only front-page shortcuts to any function in the Members Only menu, and specific record they work with frequently, and any external document or web site they use in conjunction with MEMBERS ONLY.

User-Configured Fields

The person and organization table both permit the addition of user fields. You can add up to 40 user fields – they can be text, dropdown, logical (checkbox), or date. These user-added fields all go on the User Page of the person or organization record. You have the ability to position and group these fields on this page however you wish. All user-defined fields appear in the report generator and can be searched on and output.

Duplicate Alert

The Duplicate Alert catches potential duplicate records as a user enters new people into the database. All these records are displayed in a grid; if one of these is the same person being entered, the user can jump to that record with a single click.

Joiner

Try as you will, your users will occasionally enter duplicate records into MEMBERS ONLY, and catch it only after each account has some history. The MEMBERS ONLY *joiners* allow you to merge together a pair of records like this. When the records are merged, all related information from all the modules is also merged, so that you end up with a single unified history.

The Contact Log

The contact log in the MEMBERS ONLY CRM Module allows you to keep track of all important phone calls, email exchanges, or meetings with the people you serve.

Recording Contacts With Your Community

- The contact log allows you to enter a record of all-important contacts with the people in your database. Each contact has a date, the staff member involved, a short subject line and a longer memo pad for recording the contents of the communication. Each contact record also has a field to track HOW the contact occurred - in person, by e-mail, and so on.

- Contacts for someone affiliated with an organization will show on that organization's Contact Listing, even if the individual switches organizations, as well as on the individual's form.

- Keyword like topics can be associated with the contact for quick searches.

Attachments

- You can attach any number of documents of any type to any contact log record. Photographs, Word documents, and spreadsheets are just a few of the items you can attach.

- Clicking the View Document button on any contact will open the file in the associated application.

- You can attach a web site to a contact. Clicking View Document will open your browser and point it to the attached site.

Follow-up and Tickler

- Very often there are follow-up commitments resulting from a contact recorded in the log. They can be recorded here, along with due dates, status coding, and a note about the nature of each one.

- Each follow-up task can be assigned to a specific staff member. Follow-up tasks will appear on that person's Personal Tickler screen.

- Each user can place other tasks he or she wants to keep track of directly on their own personal tickler even if no Contact Record is involved.

- An email is generated for the tickler items as a reminder.

The Blast

BLAST communications moves your ability to communicate

Take your MEMBERS ONLY contacts to a new level. Working in conjunction with your standard email package and the optional **Copia**™ Fax Server, the Blast communications component allows you to send a message to a group of contacts via each person's preferred means of communication - email, fax, or the post office. Or you can choose the means, and send them all the way **you** prefer to send them. The Mailing History Capabilities of the Blast also add to your regular U.S. Mail management, by giving you enhanced tracking capabilities.

Sending a Blast Communication

Blast Communications can be sent by fax, email, or USPS. Each person in your system can be given a **preferred delivery method**. The Blast software will segregate the people on your delivery list so that each receives the document by his or her preferred means. Optionally, you can select the means and send to everyone in the same way. The document(s) are customized for the recipient. Blast communications can be sent to everyone selected by a query, or to all persons on any MEMBERS ONLY List.

Keep track of the Content of each mailing

With a single click, bring up the document you Blasted from **MEMBERS ONLY**. Maintain a note describing the mailing, its contents, and its purpose. Keep other miscellaneous information on each mailing.

Link to your Development campaigns or other projects

Each mailing can be tied to a specific **fundraising effort**. In addition, each piece of mail can be assigned a specific source code, which can be associated with incoming **donations** if you are using our Fundraising module.

Track recipients of each mailing

The software will display, on each person's record, a history of all mailings that they have received. You can view at a glance each mailing's code and description, as well as the date sent. If you want more information, just double-click the history entry to see the full Mailing Information Form.

Track the Details of each communication

- Number emailed, faxed, and mailed

- Letterhead used

- Envelope Type used

- Labels used

- Enclosures

- Number distributed in-house

- Number distributed externally

- **MEMBERS ONLY** Lists to which you sent the mailing

The **Mailing Information Form** allows you to keep track of all the details of each mailing or other communication you do - either for costing purposes, or to track the efficacy of a mailing.

Personalized Emailing Features

Use customized emails to communicate with your constituents. Use HTML, either from a file or from a web site, to make your emails look good. Use graphics on your web server to cut down on sending time and keep track of click-throughs. You can even personalize the subject line.

*COPIA is a trademark of COPIA, Inc.

The Query

The MEMBERS ONLY query uses a simplified version of the industry-standard SQL structured query language to extract data sets. The structured Query Entry Form makes it easy to remember the format of a query, and the Fields and Tables lists keep the structure of your data at your fingertips as you work. MEMBERS ONLY does the linking of tables behind the scenes, so you never need to tell the system how to link the tables together.

Filing a MEMBERS ONLY query to use again

Once you have written your query and are sure it does just what you want, you can save it to use again. The ASK function allows you to save your query with variables in it - the user will be prompted to supply them at run-time.

Putting the results of your query on a list

MEMBERS ONLY allows you to place all the records found by your query on a list. This can be a list that has already been defined, or a new list that you create on the fly. You also have the option of removing the records that you have found from an existing list. Using lists lets you refine a set of records through successive queries. You can of course always query for the records on a list - since lists are all indexes, such queries are extremely quick.

Creating a report from your query

You can turn the results of any query into a columnar report with a few clicks. The Report Definition Form lets you compose titles, determine grouping and subtotaling, and set fonts prior to before viewing your report. When the report appears in the viewer, you can adjust column widths and edit the titles and column headers before you send the output to the printer.

Creating labels from your query

The MEMBERS ONLY label designer allows you to set up labels, which display any field available in a person's record. While this feature was originally designed for mailing labels, our users have used it to create badges, tickets, and a range of other outputs. The system comes with four standard Avery Labels and a meeting badge already set up - your users can easily create additional formats.

Creating a word processing merge from your query

The Word Processing Merge Feature allows you to create a data file to use in a merge with Microsoft Word, or other standard word processors. Default fields necessary for creating a form letter go into the merge file automatically - your users can add any additional fields to merge that they need. While most often the merge is used for a form letter, it can be used to create a wide range of other documents.

MEMBERS ONLY Directory (HTML or PDF)

The Directory is a two-column name, address and phone listing. The exact fields, which will appear in the directory, and the title of the listing, are user-configurable.

Other standard MEMBERS ONLY outputs

MEMBERS ONLY provides a number of other standard outputs. These include:

- **Personal Profile (PDF)** - a standard output that prints a page of information about each person you have selected.

- **Table Placards** - These are cards that you can fold lengthwise and place on a conference table to identify speakers. When folded, the speaker name appears on both sides.

- **Envelope Printer** - This option allows you to drive an envelope printer from MEMBERS ONLY. This output type will operate an envelope printer whether or not a windows driver is available for that printer.

- **Comma-Delimited, Tab-Delimited , and MS- Excel Export files** - This option allows you to create export files that can then be loaded into other software, such as spreadsheet and database programs.

- **Blast** - send a blast to the people that matched your query.

Supervisory Features

Users with supervisory access can use the query to delete sets of records from the database, or to perform a global replacement across a set of selected records.

The Importer

Designed originally as an in-house tool for our staff to use for Data Conversion, the **MEMBERS ONLY** Importer gives you the ability to load data into your **MEMBERS ONLY** database from a variety of external sources.

Easy to set up and use

An intuitive, visual interface lets you drag each field from the file you want to import over to the field in **MEMBERS ONLY** you want to associate it with.

You can save and reload such Importer Setups so that the same import can be run many times.

An import log file tracks the number of records processed, and lists any records that could not be imported for any reason.

A host of powerful features

The **MEMBERS ONLY** importer provides a host of powerful features that allow it to assist you in a variety of database management tasks.

- Load new records into the database.

- Update existing records with fields from an external file.

- Turn on or off the MEMBERS ONLY rules that are triggered when data is inserted.

- Automatically add options to the lists of possible values for drop-down fields.

- Automatically create new mailing lists.

- Insert information about people into the Person, Address, Phone, and Organization tables on a single pass.

Works with Microsoft Excel or Access

The **MEMBERS ONLY** importer is designed to work closely with Microsoft Office tools as you prepare data from a variety of sources for loading into **MEMBERS ONLY**. Using these tools you can review and edit the data prior to further processing. And the powerful VB scripting capabilities of Excel or Access will allow you to massage the incoming data into the format **MEMBERS ONLY** expects before the final import.